



# Prioritizing the Financial Aid Advisor

Student Financial Support  
University of Alberta

# Welcome and Introductions

# Objectives


Demonstrate benefits of prioritizing the financial aid advisor.


1. Team - building a framework for support
2. Culture - creating the environment
3. Personal Development - individual growth and engagement

# Student Financial Support Team - A History

# Amalgamation

Dictionary


Enter a word, e.g. 'pie' 

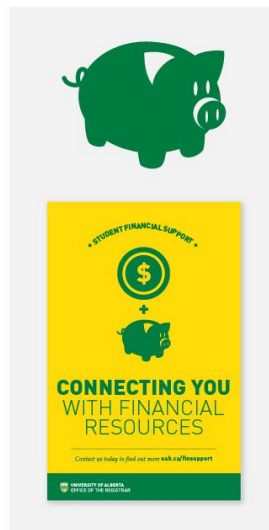
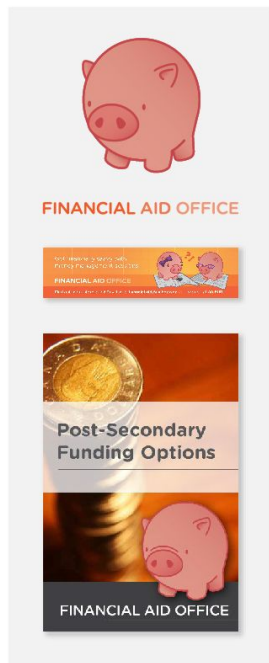
**a·mal·ga·ma·tion**  
/əˌmalgəˈmāSH(ə)n/ 

*noun*

the action, process, or result of combining or uniting.  
"the threat of amalgamation with a competitor"

*synonyms:* combination, union, blend, mixture, fusion, coalescence, synthesis, composite, amalgam  
"the amalgamation of Gleich Sanitation and Air-Sentry is now official"

 Translations, word origin, and more definitions



## Prospective Student Audience

Aligned with National Recruitment

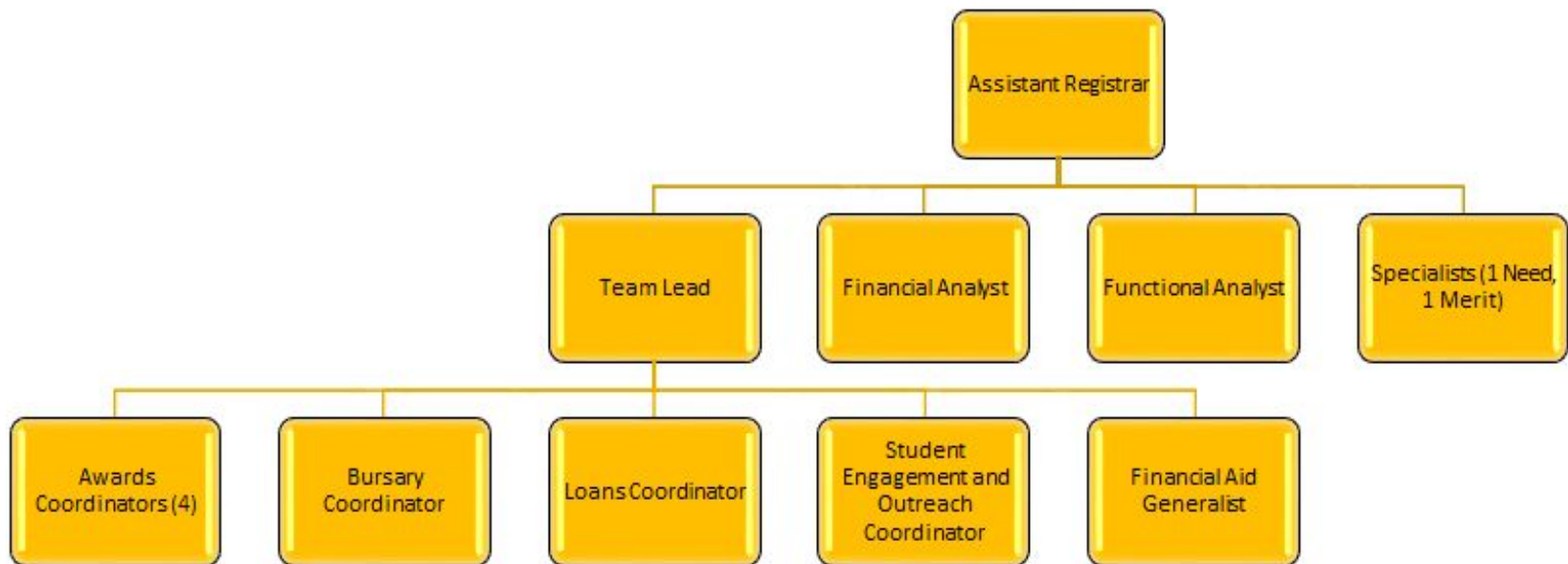


## Current Student Audience

Aligned with Student Connect



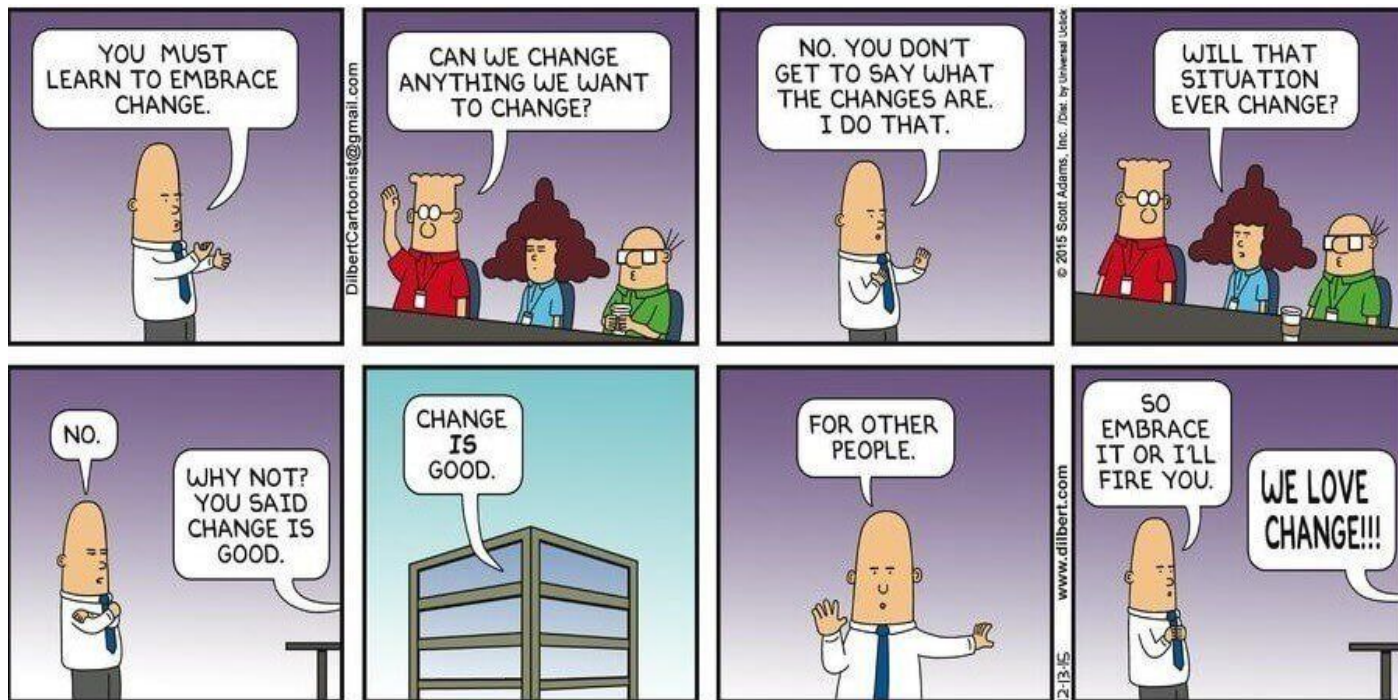
# Current Unit Organizational Structure



# First Year as a Team



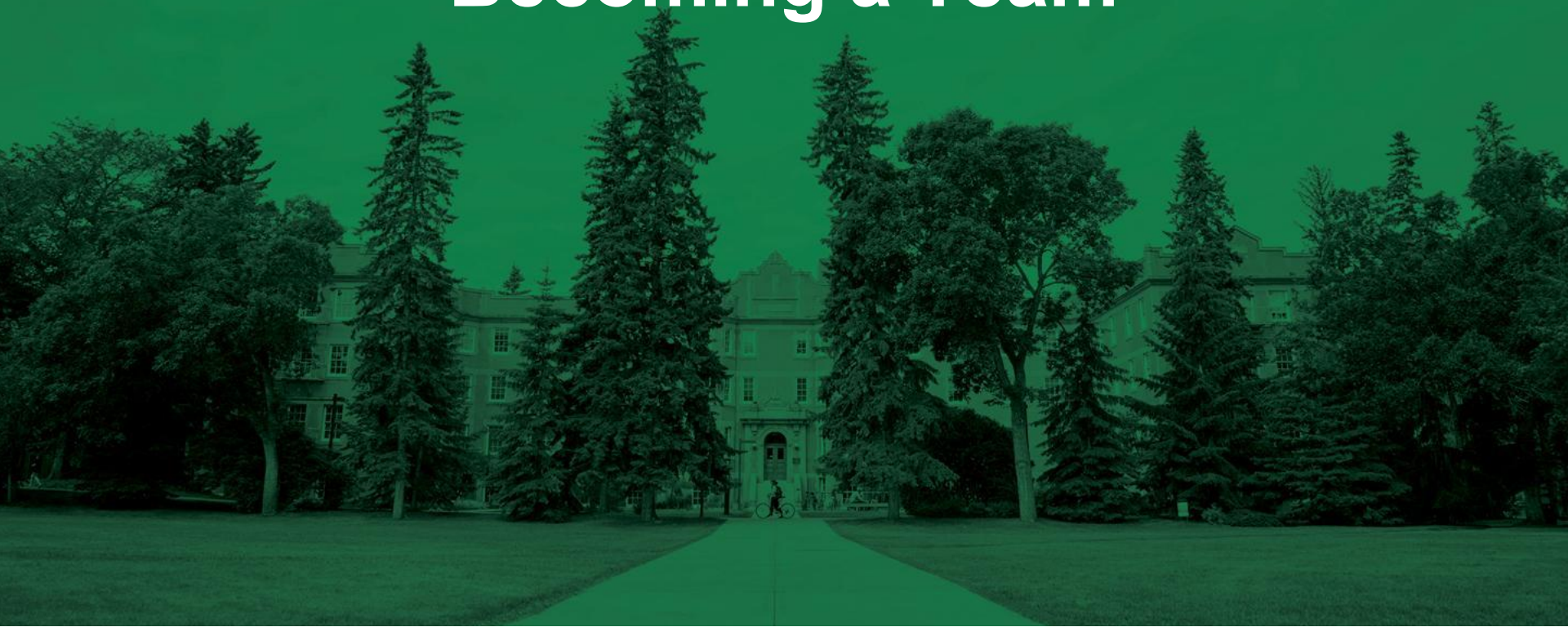
# Post Amalgamation



# Different, But the Same

- Functional communication
- Foundation for positive work environment
- Acknowledge differences

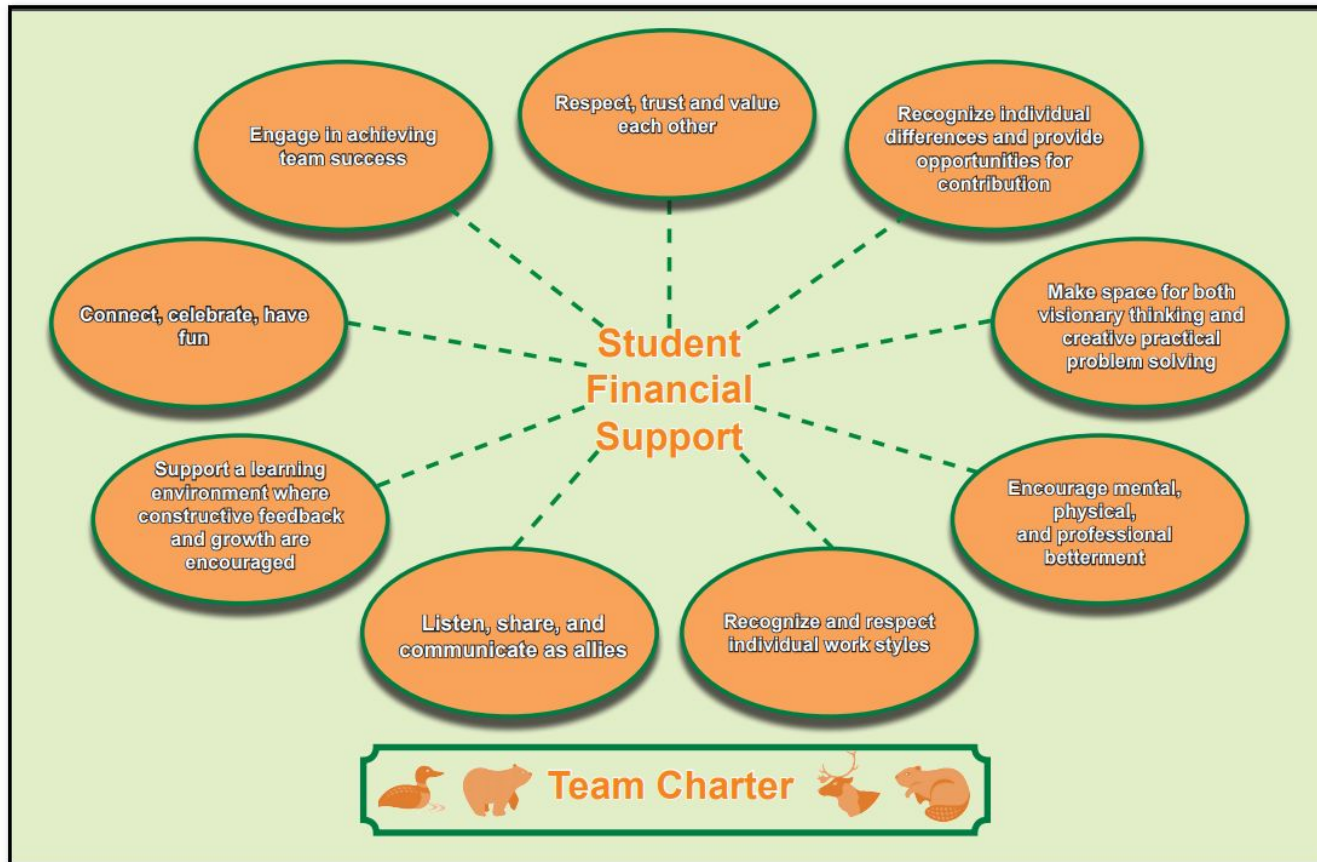
# Second Year Becoming a Team



# New Leadership

- New Team Members
- Lifecycle of SFS
- Meetings
- Charter

# Unit Team Charter



# Being a Team

# Finding Our Stride



# Creating Space for Success

- Staffing
- Working groups
- Defined space for merit/need
- Cross support
- Fun

# Succeeding as a Team

# Where We Are Now

**Collaboration**  
**produces**  
**better**  
**decisions**

# Example #1: Meetings

- Evaluation
- Identify Purpose
- Staff initiated
- Ownership
- Leadership support and direct

## Example #2: Debriefing

- Staff initiated
- Ownership
- Leadership support and direction
- Team effort

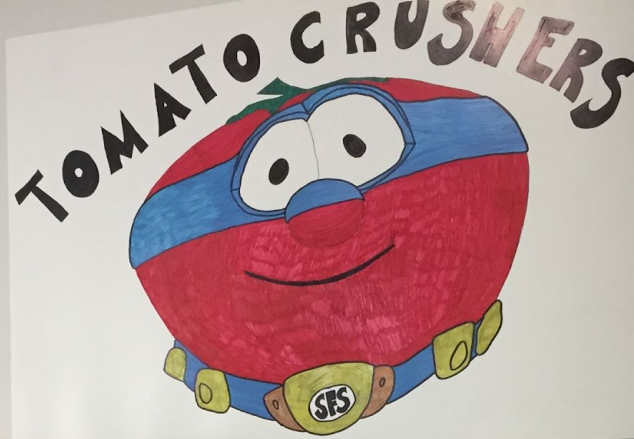
## Example #3: Office Layout

- Open, but not well planned
- Identified issues
- Plan
- Opportunity
- Implement

# Advising and Engagement

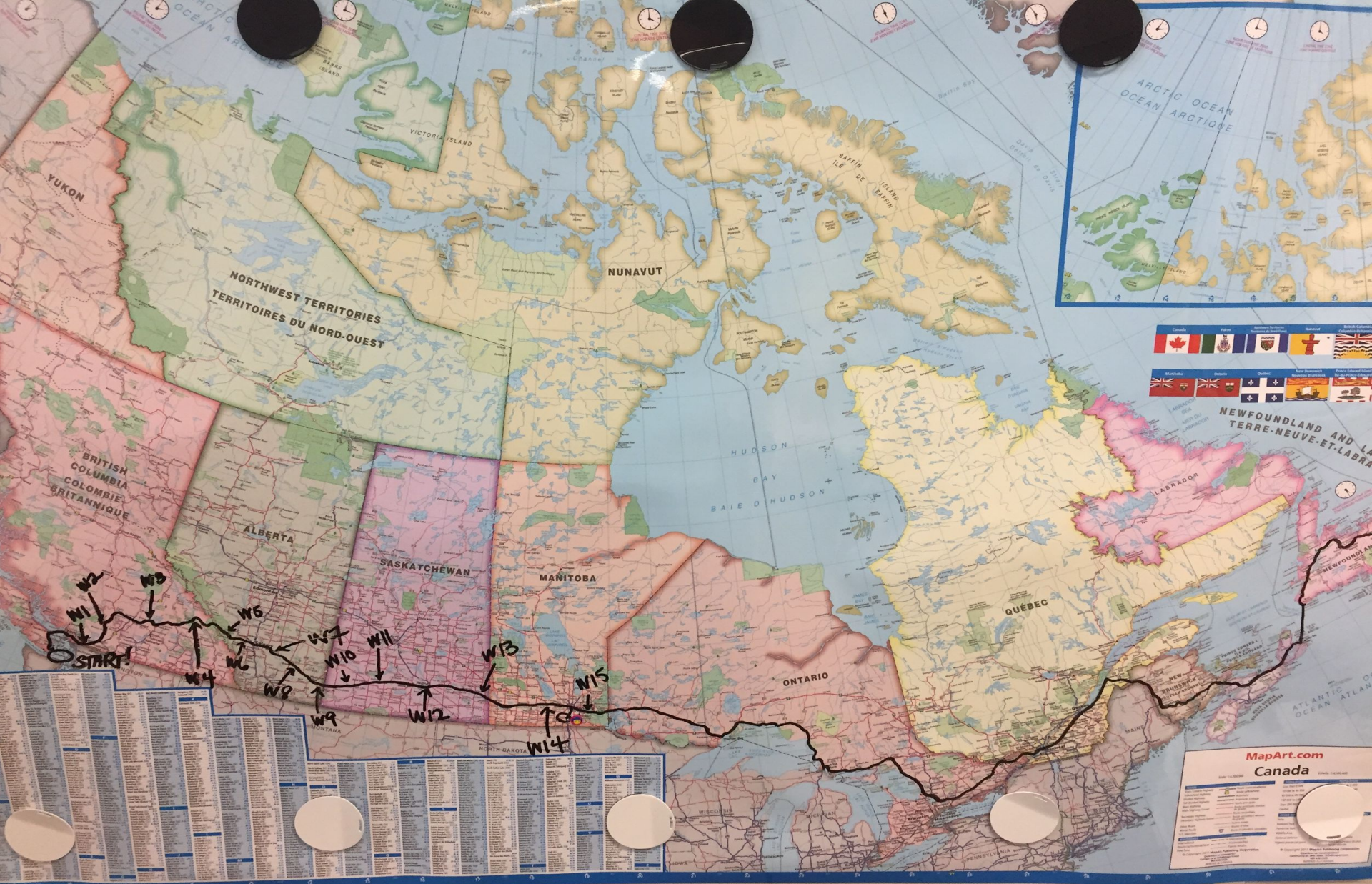
- We are still student service advisors
  - ~ 700 via advising appointments
  - ~ 2000 via outreach events
  - ~ 4500 via phone
  - ~ 5500 via web/email
- Training / PD
  - QPR - suicide prevention training
  - Campus Social Workers
  - Credit Counselling Society
  - Unconscious bias training
  - University Protective Services
  - Campus Food Bank
  - Indigenous Initiatives
    - *Blanket Ceremony*
    - *Historical Trauma Training*
  - Mindfulness and self care
- Team Building
  - Food bank challenges
  - Cross Canada challenge
- Associations and working groups
  - Alberta Student Awards Personnel Association (ASAPA)
  - Canadian Association of Student Financial Aid Administrators (CASFAA)
  - Student Advisors Conference
  - Welcoming, Connected & Supportive Campus Community Committee
  - Advisory Committee on Student Financial Supports
  - Office of the Registrar Strategic Plan Development Working Group
    - *Equity, Diversity, and Inclusion Working Group*
    - *Professional Development Working Group*
    - *Orientation Working Group*
    - *Service Delivery Model Working Group*





16 hampers = 560 pts  
 \$50 Gift Card = 25 pts  
 12 cans of chick peas = 24 pts  
 2 additional bags of pasta = 4 pts  
 20 additional rice = 40 pts  
 2 additional oat portions = 4 pts  
 Total: 657 pts!





# Service Outcomes

- Stakeholder relationships
  - First Peoples' House
  - International Student Services
  - Campus Food Bank
  - Residence
  - Faculties
  - Internal RO Units
- Increasing student outreach and financial literacy footprint
  - Multiple workshops
    - *workshop series*
    - *targeted / program specific sessions*
  - Loans 101
  - Prospective student and orientation events
  - Monthly eNews
- New online applications
  - scholarship
  - financial aid
- Database updates and improvements
  - emergency loan data
  - automated selection and communication
  - T4As online
  - improved quality assurance and reporting
  - Online payment of awards previously paid via pay action forms
- Entrance yield packages
- Entrance scholarship rebranding (Fall 2019)
- Website redesign
- US loans reentry (early stages)



# Moving Forward

# Continual Evaluation and Improvement

- Teams are fluid
- Needs change
- Build on success

# Team, Culture, Personal Development

- Create the environment
- Trust, respect and empower
- Build the individual to build the team

# Questions